Grain Transportation Report

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The next release is May 27, '04

Diesel Fuel Prices Move Harbor Truckers To Strike. Harbor truckers protested against high fuel prices in California during the week of May 3, demanding that shipping lines pay higher fuel prices. The protest has spread to several other U.S. ports. Even though truckers have reached a tentative agreement, there remains the possibility that protests will recur before the end of the year if independent drivers are unhappy and world crude oil prices rise to the Department of Energy's projected levels.

Fuel prices continue to rise as the summer peak driving season begins. As of April 27, California truckers were paying an average of $2.27 per gallon for diesel fuel, 56 cents per gallon higher than the national average and 22 cents per gallon higher than their competitors in Arizona, according to the California Trucking Association. World crude oil prices averaged $28 per barrel for 2003; 2004 prices are expected to average $33 per barrel, $5 above last year's overall rate. The potential for price spikes remains a danger, given the uncertainty of the Organization of Petroleum Exporting Countries production levels, the uncertainties surrounding the continued recovery of oil output and exports from Iraq, and political unrest in Venezuela. (*Short-Term Energy Outlook*, April 2004, Energy Information Administration, Department of Energy)

Container yards and terminals used for the export of containerized grain and animal feed could become congested and/or over-crowded because of these trucker protests. The United States exported more than 27,000 metric tons of containerized grain from California ports during May 2003. This is equivalent to 2,600 20-foot-equivalent units. According to a 3-year average, May is a relatively high point of the year for shipping containerized grain (see figure 14 inside). For the past 3 years, animal feed has been the top containerized agricultural commodity shipped to Asia during the month of May. Animal feed accounted for an average of 15 percent of containerized agricultural products exported from the United States during May 2001, 2002, and 2003. Ron.Hagen@USDA.gov; April.Taylor@USDA.gov.

Transport System Delays Tie Up Bulk Carrier Capacity. China's booming economy is pushing China's transport system to its limits. Delays at China's ports have resulted in as much as 15 percent of the world's fleet of large bulk carriers now being idle, according to Henry Banga, vice-chairman of Noble Group, a Singapore-listed trading company. According to Mr. Banga, bulk carriers are currently waiting 18-24 days to unload cargo at Chinese ports. The problem is not so much with lack of capacity dockside as it is with the lack of railway capacity to remove cargo from docks. As a result, cargo at China's ports is piled high awaiting transport. (*Economist Intelligence Unit*, May 11, 2004) The magnitude of these delays could result in ocean freight rates for grain decreasing at a slower rate than expected. Ocean rates this year have been unusually high due to increased demand for bulk shipping. For instance, ocean rates from the U.S. Gulf to Japan during the first quarter 2004 increased 164 percent from rates during the first quarter of 2003 (see table 16 inside). Marvin.Prater@USDA.gov; Karl.Hacker@USDA.gov.

Grain Transportation Indicators

Table 1--Grain transport cost indicators*

Week ending		Truck	Rail	Barge	Ocean: Gulf	Ocean: Pacific
	05/19/04	118	91	94	234	216
Compared with last week		↑	↓	↑	↓	↓

*Indicator: Base year 2000 = 100; Weekly updates include truck = diesel ($/gallon); rail = nearby secondary rail market ($/car); barge = spot Illinois River basis (index = percent of tariff rate); and ocean = routes to Japan ($/metric ton)

Source: Transportation & Marketing Programs/AMS/USDA

Table 2--Market update: U.S. origins to export position price spreads ($/bushel)

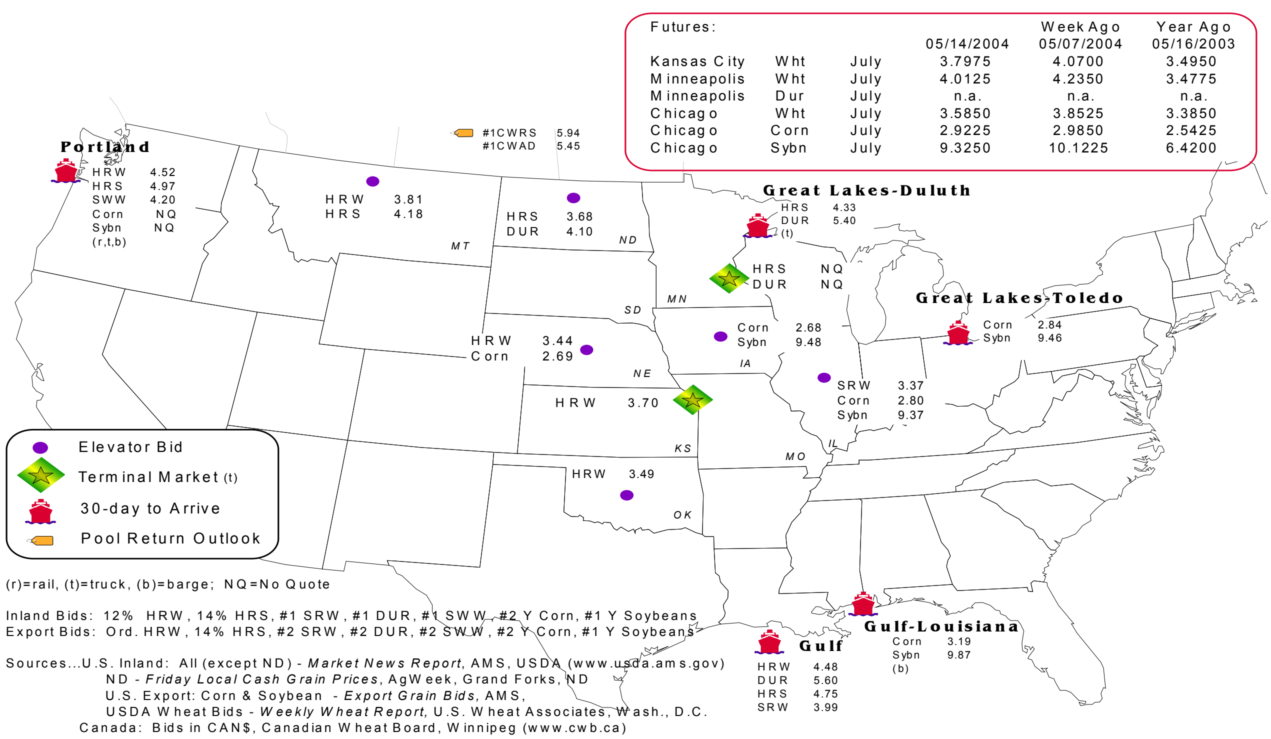
Commodity	Origin--destination	5/14/2004	5/7/2004
Corn	IL--Gulf	-0.39	-0.39
Corn	NE--Gulf	-0.50	-0.49
Soybean	IA--Gulf	-0.39	-0.45
HRW	KS--Gulf	-0.78	-0.92
HRS	ND--Portland	-1.29	-1.44

Note: nq = no quote

Source: Transportation & Marketing Programs/AMS/USDA

The **grain bid summary** illustrates the market relationships for commodities. Positive and negative adjustments in differential between terminal and futures markets, and the relationship to inland market points, are indicators of changes in fundamental market supply and demand. The map may be used to monitor market and time differentials.

Figure 1
Grain bid summary



Rail Transportation

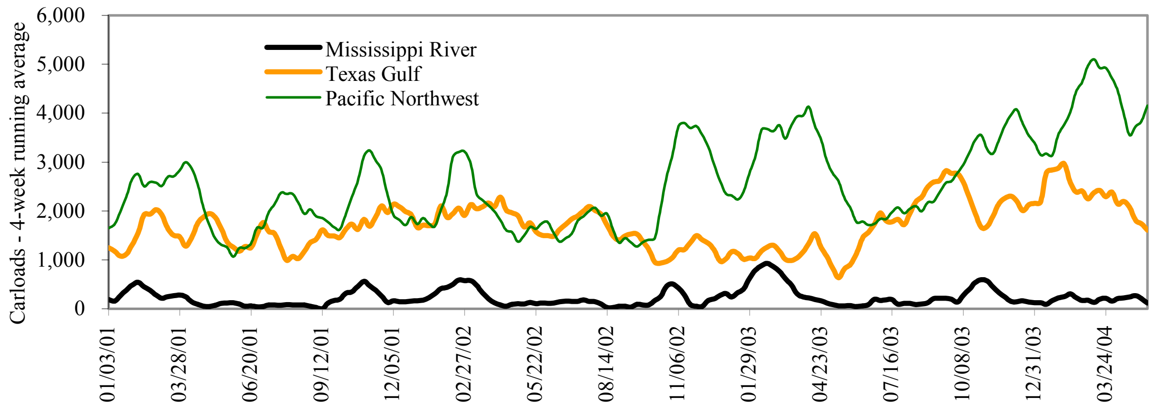
Table 3--Rail deliveries to port (carloads)*

Week ending	Mississippi Gulf	Texas Gulf	Pacific Northwest	Atlantic & East Gulf	Total
5/12/2004 p	33	1,800	4,007	14	5,854
5/05/2004 r	124	1,557	4,471	65	6,217
2004 YTD	3,692	43,364	79,904	3,485	130,445
2003 YTD	8,236	20,943	62,643	9,502	101,324
2004 as % of 2003	45	207	128	37	129
Total 2003**	14,934	88,118	150,530	20,509	274,091
Total 2002	10,937	84,625	111,832	20,842	228,236

(*) Incomplete Data; (**) Excludes 53rd week;YTD = year-to-date; p = preliminary data; r = revised data
Source: Transportation & Marketing Programs/AMS/USDA

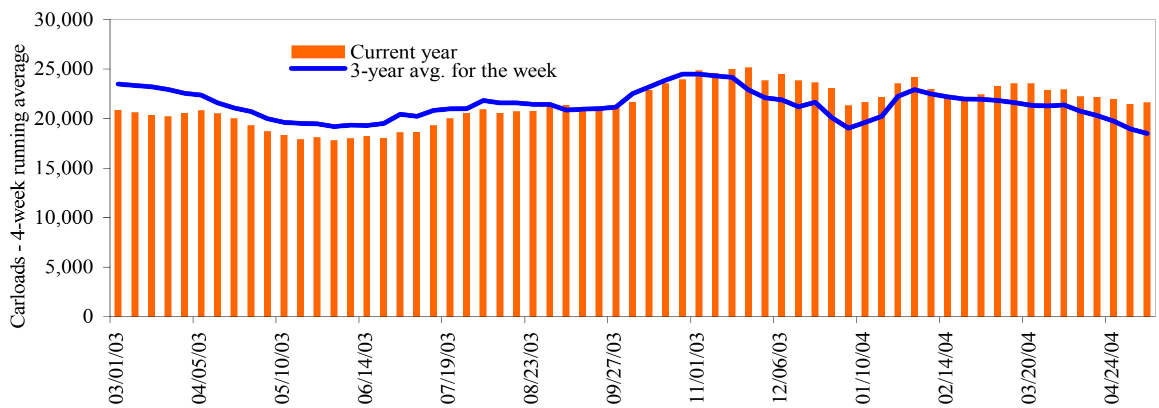
Railroads originate approximately 40 percent of U.S. grain shipments. Trends in these loadings are indicative of market conditions and expectations.

Figure 2
Rail deliveries to port



Source: Transportation & Marketing Programs/AMS/USDA

Figure 3
Total weekly U.S. grain car loadings for Class I railroads



Source: Association of American Railroads

Table 4--Class I rail carrier grain car bulletin (grain carloads originated)

	East		West			U.S. total	Canada	
Week ending	CSXT	NS	BNSF	KCS	UP		CN	CP
05/08/04	2,569	3,311	8,459	312	6,620	21,271	5,175	4,091
This week last year	2,498	3,201	6,398	306	5,540	17,943	2,898	3,206
2004 YTD	52,620	59,415	167,135	9,543	119,839	408,552	86,211	64,594
2003 YTD	50,271	58,668	137,059	5,920	114,610	366,528	60,614	63,732
2004 as % of 2003	105	101	122	161	105	111	142	101
Total 2003*	146,395	171,260	416,371	24,506	336,079	1,094,611	197,993	198,185

Source: Association of American Railroads (www.aar.org); YTD = year-to-date; * Excludes 53rd week

Table 5--Rail car auction offerings ($/car)*

Delivery for:	June 04	July 04	Aug. 04
BNSF[1]			
COT/N. grain	no offer	no offer	no offer
COT/S. grain	no offer	no offer	no offer
UP[2]			
GCAS/Region 1	no offer	no bid	$1
GCAS/Region 2	no bid	no bid	no bid

*Average premium/discount to tariff, last auction

[1]BNSF - COT = Certificate of Transportation

N includes: ID, MN, MT, ND, OR, SD, WA, WI, WY, and Manitoba, Canada.

S includes: CO, IA, IL, KS, MO, NE, OK, TX, NM, AZ, CA, UT, and NV.

[2]UP - GCAS = Grain Car Allocation System

Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

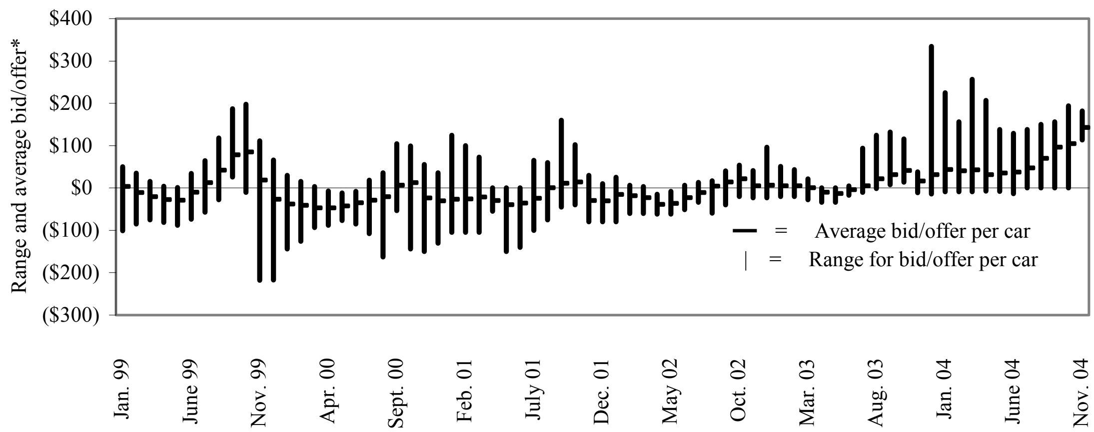
Source: Transportation & Marketing Programs/AMS/USDA

Rail service may be ordered directly from the railroad via **auction** for guaranteed service or tariff for nonguaranteed service or through the secondary market.

The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/supply.

Figure 4

Secondary rail car market, delivery month-year



*up to 6 months of trading

Source: Transportation & Marketing Programs/AMS/USDA

Average bid/offer is the simple average of all the weekly bids/offers over the entire period (up to 6 months) for guaranteed railcars that are traded for delivery in a particular month.

Range for bid/offer shows the range of average weekly bids/offers over the entire period (up to 6 months) for guaranteed railcars that are traded for delivery in a particular month.

Table 6--Weekly secondary rail car market ($/car)*

	Delivery period			
Week ending	**June 04**	**July 04**	**Aug. 04**	**Sept. 04**
BNSF-GF				
5/14/2004	-$1	$13	$37	$98
Change from last week	$12	$2	-$2	$22
UP-Pool				
5/14/2004	-$8	$14	$23	$54
Change from last week	-$17	-$2	-$43	-$48

*Average premium/discount to tariff, $/car-last week

Note: Bids listed are market INDICATORS only & are NOT guaranteed prices,
Missing value = no bid quoted; GF = guaranteed freight; Pool = guaranteed pool

Sources: Transportation and Marketing Programs/AMS/USDA

Data from Atwood/ConAgra, Harvest States Co-op, James B. Joiner Co., Tradewest Brokerage Co.

Table 7--Tariff rail rates for unit and shuttle train shipments*

Effective date: 5/3/2004	**Origin**	**Destination**	**Rate/car**	**Rate/metric ton**	**Rate/bushel****
Unit train*					
Wheat	Minneapolis, MN	Houston, TX	$2,020	$22.27	$0.61
	Kansas City, MO	Galveston, TX	$1,820	$20.06	$0.55
	Minneapolis, MN	Portland, OR	$4,148	$45.72	$1.24
	St. Louis, MO	Houston, TX	$1,995	$21.99	$0.60
	Kansas City, MO	Laredo, TX	$2,280	$25.13	$0.68
	Chicago, IL	Albany, NY	$1,834	$20.22	$0.55
	Chicago, IL	Richmond, VA	$1,961	$21.62	$0.59
Corn	Minneapolis, MN	Portland, OR	$3,240	$35.71	$0.91
	Chicago, IL	Baton Rouge, LA	$2,736	$30.16	$0.77
	Council Bluffs, IA	Baton Rouge, LA	$2,170	$23.92	$0.61
	Evansville, IN	Raleigh, NC	$1,841	$20.29	$0.52
	Council Bluffs, IA	Stockton, CA	$3,496	$38.54	$0.98
	Kansas City, MO	Dalhart, TX	$1,745	$19.24	$0.49
	Columbus, OH	Raleigh, NC	$1,750	$19.29	$0.49
	Des Moines, IA	Laredo, TX	$2,930	$32.30	$0.82
Soybeans	Minneapolis, MN	Portland, OR	$3,310	$36.49	$0.99
	Chicago, IL	Baton Rouge, LA	$2,736	$30.16	$0.82
	Council Bluffs, IA	Baton Rouge, LA	$2,799	$30.85	$0.84
	Des Moines, IA	Laredo, TX	$2,930	$32.30	$0.88
	Evansville, IN	Raleigh, NC	$1,841	$20.29	$0.55
	Chicago, IL	Raleigh, NC	$2,441	$26.91	$0.73
Shuttle Train*					
Wheat	St. Louis, MO	Houston, TX	$1,795	$19.79	$0.54
	Minneapolis, MN	Portland, OR	$4,096	$45.15	$1.23
Corn	Fremont, NE	Houston, TX	$2,425	$26.73	$0.68
	Minneapolis, MN	Portland, OR	$3,090	$34.06	$0.87
Soybeans	Council Bluffs, IA	Houston, TX	$2,255	$24.86	$0.63
	Minneapolis, MN	Portland, OR	$3,110	$34.28	$0.87

*A unit train refers to shipments of at least 52 cars. Shuttle train rates are available for qualified shipments of more than 100 cars that meet railroad efficiency requirements.

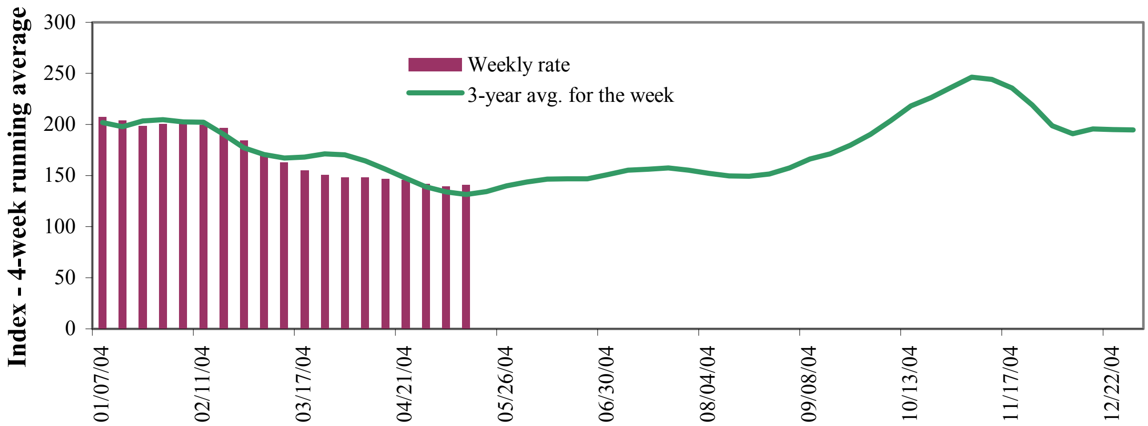
**Approximate load per car = 100 short tons: corn 56 lbs./bu., wheat & soybeans 60 lbs./bu.

Sources: www.bnsf.com, www.cpr.ca, www.csx.com, www.uprr.com

Barge Transportation

Figure 5

Illinois River barge rate index - quotes



Note: Index = percent of tariff rate

Source: Transportation & Marketing Programs/AMS/USDA

The **Illinois River barge rate index** averaged 183 percent of the **benchmark tariff rates** between 1999 and 2001, based on weekly market quotes. The **index**, along with **rate quotes** and **futures market** bids are indicators of grain transport supply and demand.

Table 8--Barge rate quotes: southbound barge freight

Location	5/12/2004	5/5/2004	May '04	July '04
Twin Cities	176	162	185	199
Mid-Mississippi	152	139	160	178
Illinois River	152	136	155	174
St. Louis	113	113	123	164
Lower Ohio	113	112	127	167
Cairo-Memphis	108	108	119	159

Index = percent of tariff, based on 1976 tariff benchmark rate

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

Benchmark tariff rates

Calculating barge rate per ton:
(Index * 1976 tariff benchmark rate per ton)/100

Select applicable index from market quotes included in tables on this page. The 1976 benchmark rates per ton are provided in map (see figure 6).

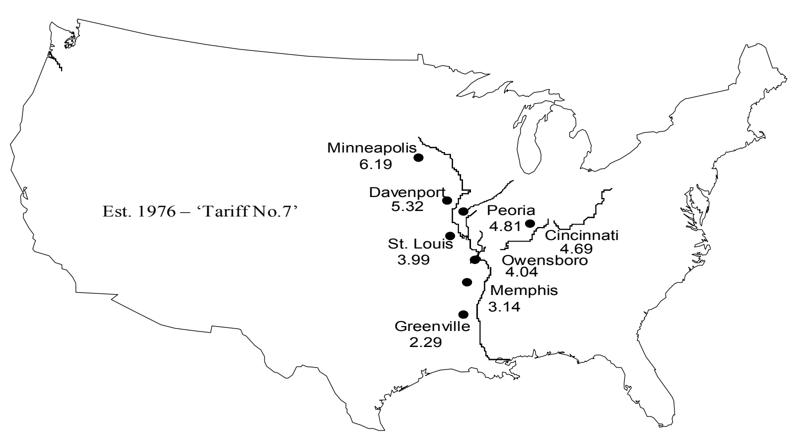


Table 9--Barge futures market (US$)*

Week ending	River/region	Contract period	Index rate Futures	Index rate Cash
5/18/2004	St. Louis	June	n/a	145
		Aug.	n/a	180
		Oct.	n/a	250
		Nov.	n/a	185
		Dec.	n/a	160
	Illinois River	June	n/a	170
		Aug.	n/a	180
		Oct.	n/a	275
		Nov.	n/a	210
		Dec.	n/a	180

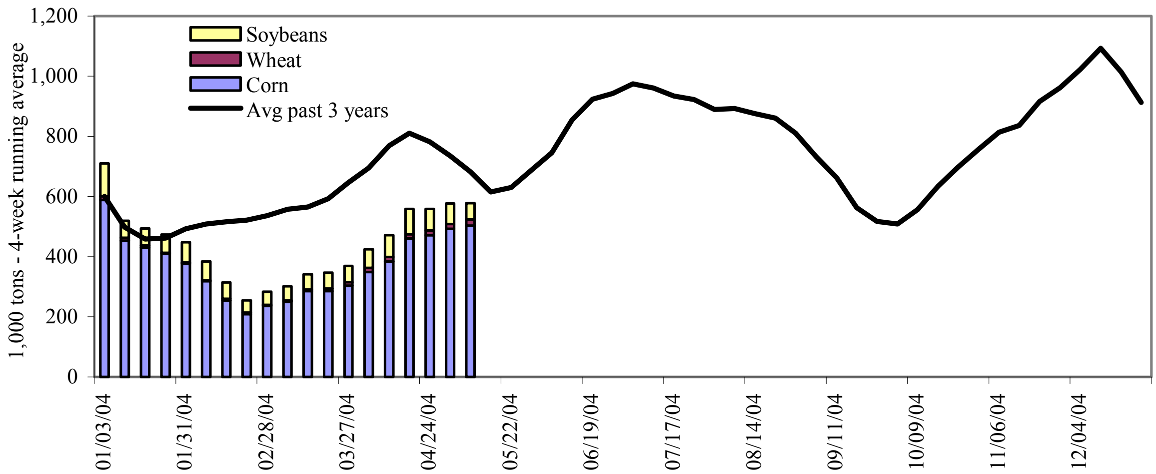
*Southbound barge freight nominal/cash basis values (US$)

Note: Index = percent of tariff, based on 1976 tariff benchmark rate

Source: Merchants Exchange of Chicago (www.merchants-exchange.com)

Figure 7

Barge movements on the Mississippi River (Lock 27 - Granite City, IL)



Source: Transportation & Marketing Programs/AMS/USDA

Table 10--Barge grain movements (1,000 tons)

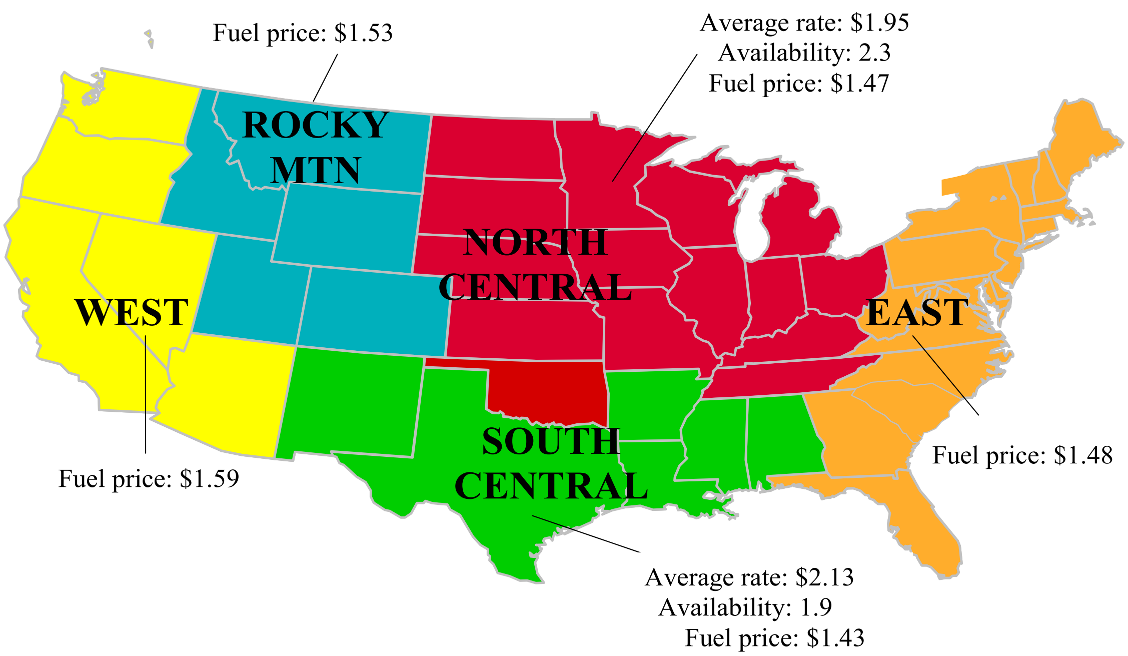
Week ending 05/08/04	Corn	Wheat	Soybean	Total
Mississippi River				
Rock Island, IL (L15)	208	6	25	239
Winfield, MO (L25)	342	28	36	406
Alton, IL (L26)	512	39	50	601
Granite City, IL (L27)	496	31	50	577
Illinois River (L8)	124	6	12	143
Ohio River (L52)	38	11	6	62
Arkansas River (L1)	0	35	3	54
2004 YTD	8,617	968	2,113	12,002
2003 YTD	9,497	625	3,709	14,208
2004 as % of 2003 YTD	91	155	57	84
Total 2003	29,898	2,787	9,146	42,526

YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1.

Source: U.S. Army Corp of Engineers (www.mvr.usace.army.mil/mvrimi/omni/webrpts/default.asp)

Truck Transportation

Figure 8
U.S. grain truck market advisory, 4th quarter 2003*



*Average rate per loaded mile, based on truck rates for trips of 25, 100, and 200 miles
Note: Fuel prices are a quarterly average (unit per gallon)
Fuel price data source: Energy Information Administration, U.S. Department of Energy, www.eia.doe.gov

Table 11--U.S. grain truck market overview, 4th quarter 2003

Region/commodity*	Rate per mile ($)			Truck availability	Truck activity	Future truck activity
				Rating compared to same quarter last year		
	25 miles	100 miles	200 miles	1=Very easy to 5=Very difficult	1=Much lower to 5=Much higher	
National average[1]	**2.58**	**1.72**	**1.56**	**2.2**	**3.2**	**2.7**
North Central region[2]	2.56	1.71	1.59	2.3	3.1	2.9
Corn	2.59	1.67	1.62	2.1	3.2	2.6
Wheat	2.30	1.66	1.52	2.7	2.8	2.9
Soybean	2.65	1.76	1.78	2.0	3.1	2.5
South Central region[2]	2.93	1.78	1.67	1.9	3.6	1.9
Corn	3.13	1.86	1.70	2.3	3.3	2.5
Wheat	2.81	1.77	1.67	1.6	3.6	1.6
Soybean	2.93	1.73	1.65	1.8	3.8	1.6

Rates are based on trucks with 80,000 lb weight limit
*Commodity averages based on truck rates for top producing states based on National Agricultural Statistics Service/USDA
[1]National average includes: AR, CO, IA, IL, IN, KS, LA, MN, MS, ND, NE, OH, OK, OR, SD, TX, and WA.
[2]Commodity rates per mile include the average of the top 3 producing states within the region.
Source: Transportation and Marketing Programs/AMS/USDA

The weekly **diesel price** provides a proxy for trends in U.S. truck rates. Diesel fuel is a significant expense for truck grain movements, accounting for 37 percent of the estimated variable cost.

Table 12--Retail on-highway diesel prices*, week ending 05/17/04 (US$/gallon)

			Change from	
Region	**Location**	**Price**	**Week ago**	**Year ago**
I	East Coast	1.700	0.022	0.223
	New England	1.804	0.036	0.223
	Central Atlantic	1.791	0.026	0.201
	Lower Atlantic	1.652	0.019	0.233
II	Midwest	1.688	0.021	0.254
III	Gulf Coast	1.664	0.019	0.289
IV	Rocky Mountain	1.951	0.023	0.468
V	West Coast	2.250	-0.005	0.766
	California	2.340	-0.016	0.818
Total	U.S.	1.763	0.018	0.320

*Diesel fuel prices include all taxes.

Source: Energy Information Administration/U.S. Department of Energy (www.eia.doe.gov)

Grain Exports

Table 13--U.S. export balances (1,000 metric tons)

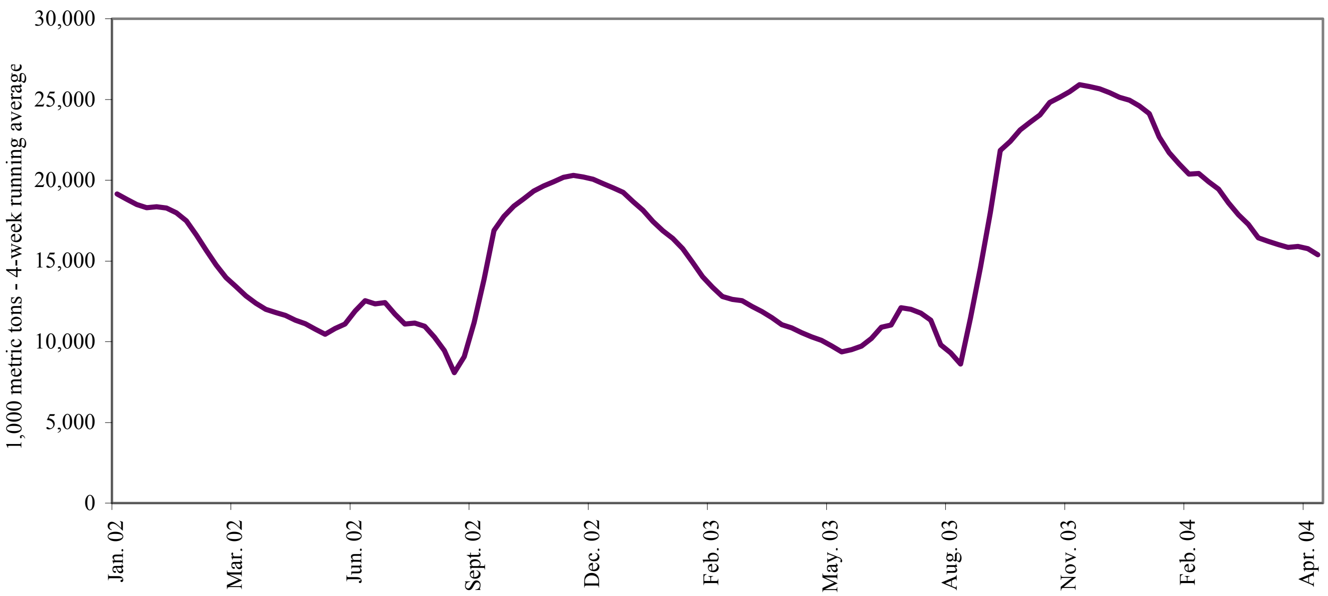
	Wheat						Corn	Soybeans	Total
Week ending 1/	HRW	SRW	HRS	SWW	DUR	All wheat			
5/6/2004	1,434	301	902	404	144	3,185	9,699	1,403	14,287
This week year ago	725	130	845	434	42	2,174	5,879	2,003	10,056
Cumulative exports-crop year									
2003/04 YTD	11,883	3,644	6,336	4,724	1,041	27,629	33,103	22,594	83,326
2002/03 YTD	6,629	2,761	6,213	3,342	719	19,665	27,092	25,586	72,343
2003/04 as % of 2002/03	179	132	102	141	145	140	122	88	115
2002/03 Total	6,896	2,899	6,645	3,517	720	20,677	39,646	28,908	89,231
2001/02 Total	8,704	5,485	5,554	3,127	1,133	24,003	47,460	29,838	101,301

Note: YTD = year-to-date. Crop year: wheat = 6/01-5/31, corn & soybeans = 9/01-8/31, 1/ = Current outstanding unshipped export sales to date

Source: Foreign Agricultural Service/USDA (www.fas.usda.gov)

Figure 9

U.S. grain, unshipped export balances, including wheat, corn, and soybean sales



Source: Foreign Agricultural Service/USDA (www.fas.usda.gov)

Table 14--Select U.S. port regions - grain inspections for export (1,000 metric tons)

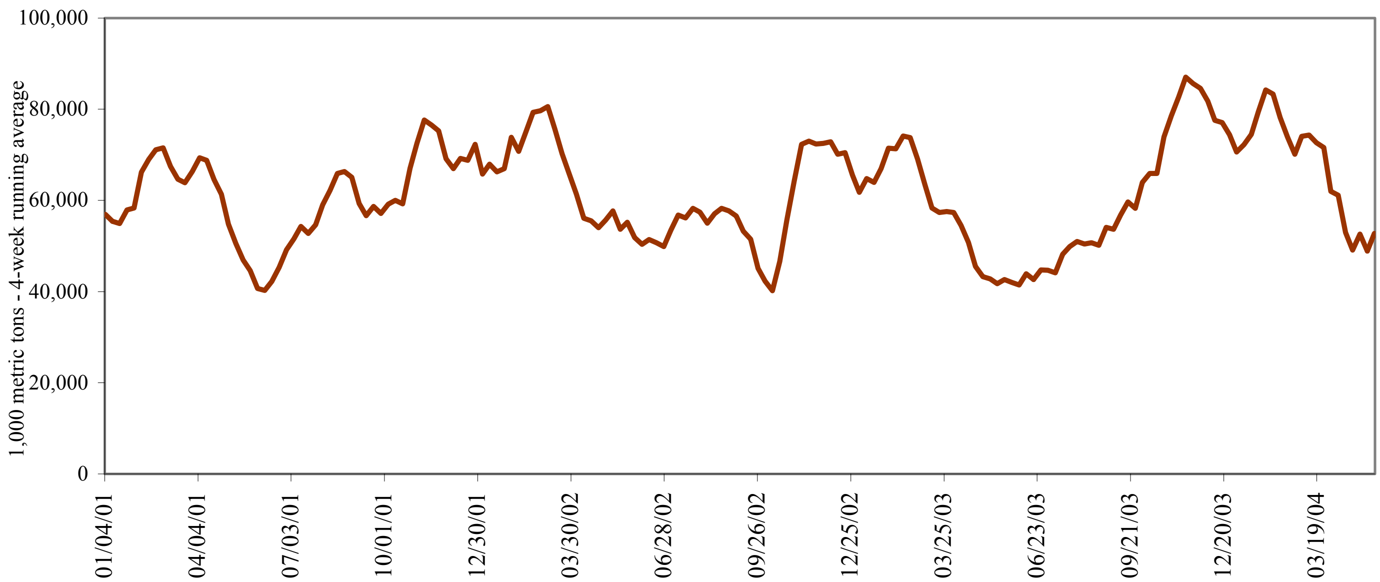
Week ending	Pacific Region Wheat	Pacific Region Corn	Pacific Region Soybeans	Mississippi Gulf Wheat	Mississippi Gulf Corn	Mississippi Gulf Soybeans	Texas Gulf Wheat	Texas Gulf Corn	Texas Gulf Soybeans	Port Region total Pacific	Port Region total Mississippi	Port Region total Texas
05/13/04	135	198	8	135	471	89	244	0	7	342	695	251
2004 YTD	4,428	4,077	1,711	2,949	12,309	5,525	3,882	49	14	10,217	20,783	3,946
2003 YTD	3,192	2,189	2,365	1,678	10,576	9,126	1,577	11	16	7,746	21,379	1,604
2004 as % of 2003	139	186	72	176	116	61	246	465	88	132	97	246
2003 Total	8,764	5,450	5,114	5,883	30,901	19,354	7,004	227	69	19,328	56,139	7,300

Source: Federal Grain Inspection Service/USDA (www.usda.gov/gipsa); YTD: year-to-date

The United States exports approximately one-quarter of the grain it produces. On average, it includes nearly 45 percent of U.S.-grown wheat, 35 percent of U.S.-grown soybeans, and 20 percent of the U.S.-grown corn. Over 60 percent of these U.S. export grain shipments departed through the Mississippi Gulf region in 2003.

Figure 10

U.S. grain inspected for export, including wheat, corn, and soybeans



Source: Federal Grain Inspection Service/USDA (www.usda.gov/gipsa)

Ocean Transportation

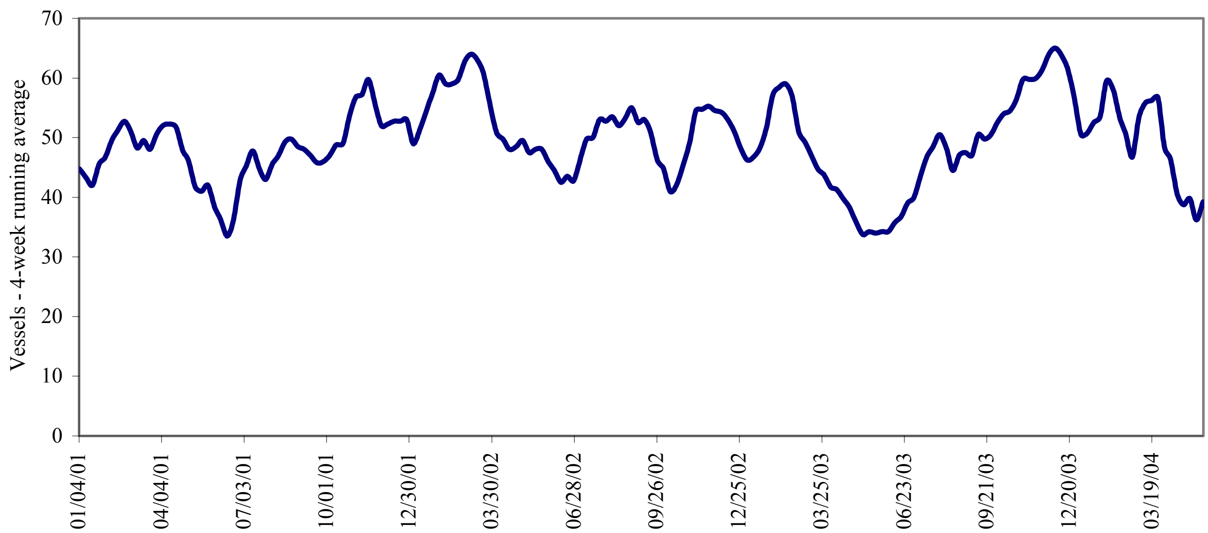
Table 15--Weekly port region grain ocean vessel activity (number of vessels)

	Gulf			Pacific Northwest	Vancouver B.C.
Date	In port	Loaded 7-days	Due next 10-days	In port	In port
5/13/2004	17	40	52	9	4
5/6/2004	16	33	62	8	5
2003 range	(11..47)	(30..76)	(39..93)	(3..13)	(1..15)
2003 avg.	31	49	62	9	6

Source: Transportation & Marketing Programs/AMS/USDA

Figure 11

Gulf Port grain vessel loading (past 7 days)



Source: Transportation & Marketing Programs/AMS/USDA

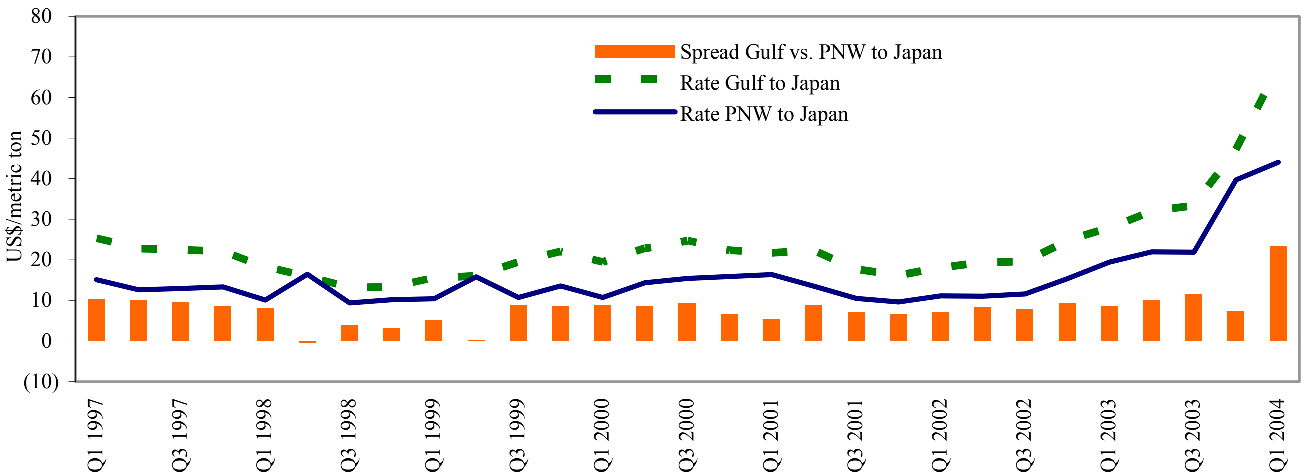
Table 16--Quarterly ocean freight rates (average rates & percentage changes) (US$/metric ton)

Countries/ regions	2004 1st qtr	2003 1st qtr	Percent change	Countries/ regions	2004 1st qtr	2003 1st qtr	Percent change
Gulf to				**Pacific NW to**			
Japan	$73.75	$27.91	164	Japan	---	$19.43	---
Taiwan	$68.00	$26.50	157				
N. Europe	---	$14.50	---	**Argentina/Brazil to**			
N. Africa	$46.25	---	---	N. Africa	$61.17	$25.35	141
Med. Sea	$46.50	$14.50	221	Med. Sea	---	$25.35	---

Source: Maritime Research, Inc. (www.maritime-research.com)

Figure 12

Grain vessel rates, U.S. to Japan



Source: Baltic Exchange (www.balticexchange.com)

Table 17--Ocean freight rates for selected shipments, week ending 05/15/04

Export region	Import region	Grain	Month	Volume loads (metric tons)	Freight rate ($/metric ton)
St. Lawrence	Spain	Wheat	May 10/12	25,000	41.00
Lake Charles	Kenya/Tanzania*	Cornmeal Bggd	May 5/15	4,000	155.00
Lake Charles	Kenya*	Wheatflour Bggd	May 1/10	1,900	185.00
U.S. Gulf	Turkey	Wheat	Apr. 15/25	55,000	52.00
U.S. Gulf	Algeria	Hvy grain	May 18/25	25,000	35.90
River Plate	Italy	Wheat	May 5/10	17,000	65.00
River Plate	Algeria	Soybean Meal	May 25/31	20,000	66.50
France	Algeria	Wheat	May 5/10	12,000	33.00
India	United Arab Emirates	Wheat	May 10/15	22,000	17.00

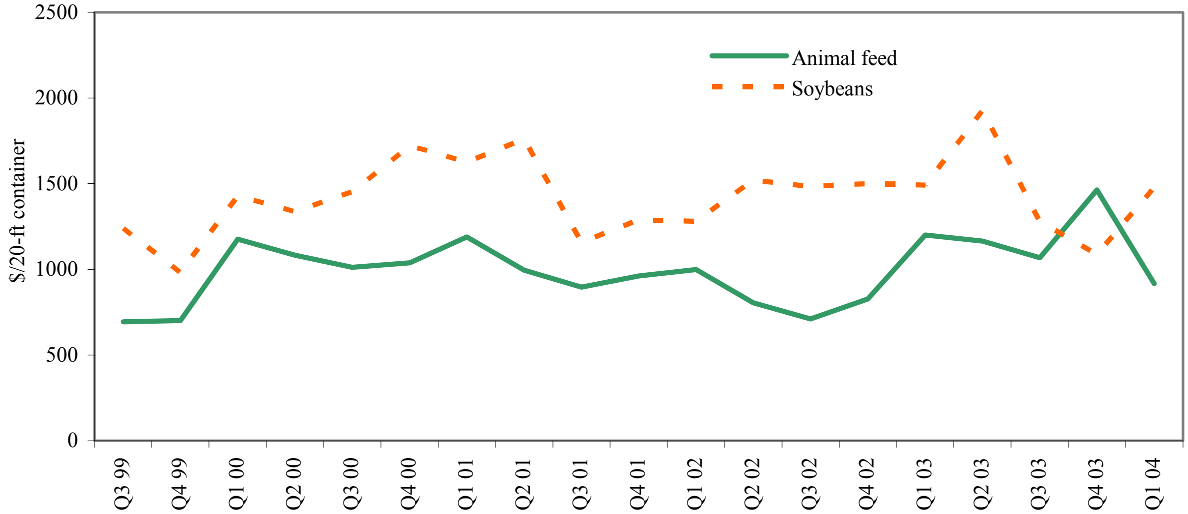
Rates shown are for metric ton (2,204.62 lbs. = 1 metric ton), F.O.B., except where otherwise indicates; op = option

*Most food aid from the United States is required to be shipped on U.S. flag vessels. The vessels are limited in availability resulting in higher rates. In addition, destinations receiving food aid generally lack adequate port unloading facilities, requiring the vessel to remain in port for a longer duration than normal.

Source: Maritime Research Inc. (www.maritime-research.com)

Figure 13

Weighted average rates[1] for containerized shipments of animal feed and soybeans to selected Asian countries



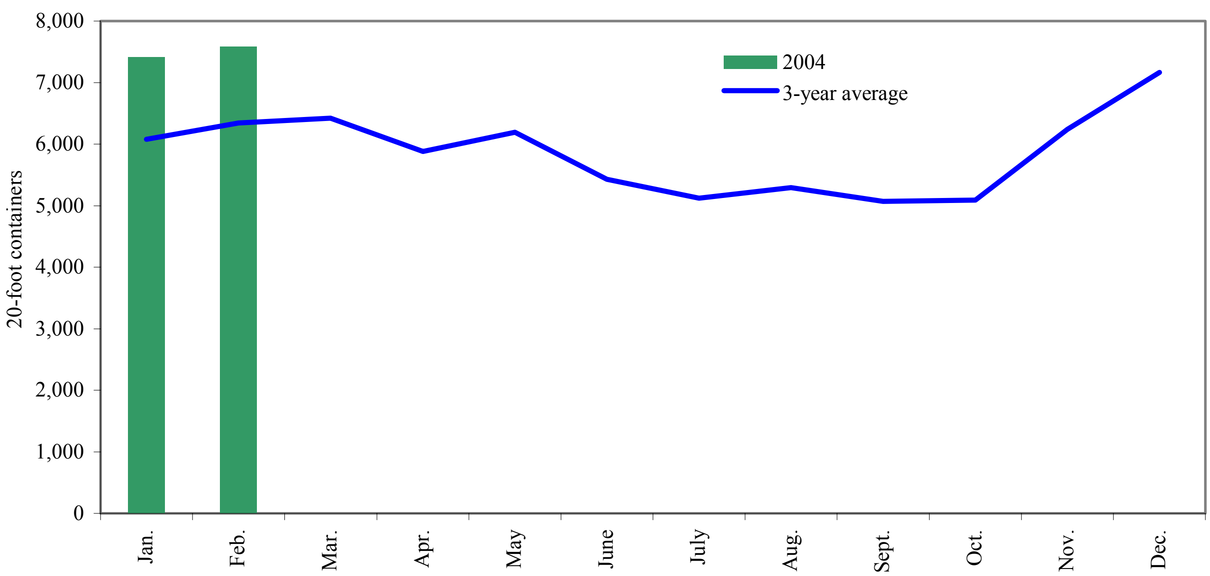
[1]Animal Feed: Busan-Korea (7%), Kaohsiung-Taiwan (46%), Tokyo-Japan (47%),
and soybeans: Bangkok-Thailand (2%), Busan-Korea (12%), Hong Kong (25%), Keelung-Taiwan (24%), Tokyo-Japan (37%)
January 2004.

Source: Ocean Rate Bulletin, Transportation & Marketing Programs/AMS/USDA

Container ocean freight rates – average rate per twenty-foot equivalent unit (TEU) weighted by shipping line market share and trade route.

Figure 14

Monthly shipments of containerized grain for 2004 compared with a 3-year average



Note: PIERS data is available with a lag of approximately 40 days

Source: Port Import Export Reporting Service (PIERS), *Journal of Commerce.*

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Related Websites

Agricultural Container Indicators	http://www.ams.usda.gov/tmd2/agci/
Ocean Rate Bulletin	http://www.ams.usda.gov/tmd/Ocean/index.asp